



# **Time and Labor (OTL)**

Review Leave Availability  
Report

DoDEA R12 Work Instructions



---

## Document Control

---

### Change Record

Date	Author	Version	Change Reference
9-Sep-2014	Robin Hardy	1.0	R12 Upgrade

---

### Reviewers

Date	Name	Position
15-Sep-2014	Bill Mohamed	Work Force Preparation, Lead

---

### Distribution

Copy No.	Name	Location
1	DODEA_R12_Review Leave Availability Report	DEPS

#### Note to Holders:

If you receive an electronic copy of this document and print it out, please write your name on the equivalent of the cover page, for document control purposes.

If you receive a hard copy of this document, please write your name on the front cover, for document control purposes.



---

---

## Table of Contents

Document Control.....	ii
Business Process Description.....	1
Business Process Description (Cont.).....	2
Review Leave Availability Report.....	3

## Business Process Description

This Leave Availability report shows leave balances by employees for 14 types of leave. The Leave balances are for the last pay period for which leave balances were accrued. Leave balances are as of the end of the prior payroll period that were received by **DAI** from **Defense Civilian Payroll System (DCPS)** (typically two to three business days after the close of the prior pay cycle and interface within the **System Data Automation (SDA)** file.) Leave balances are stored in arrears and updated on the second Thursday of each payroll period. These balances are the only amounts stored in **DAI**.

**Note: DCPS** remains the system of record for all leave balances. **DAI** receives a bi-weekly feed from **DCPS** of leave balance information. **DAI** does not calculate the leave earned during the current pay period.

The **Leave Availability Report** provides the following information:

Name of Column	Description
<b>Organization</b>	Organization name assigned by the Agency
<b>Approver</b>	Employee's timecard approver
<b>Employee Name</b>	Employee's full name
<b>Leave Type</b>	Type of leave used by the employee
<b>Leave Balances</b>	Available balance for the following leave types: <ul style="list-style-type: none"> <li>• Advanced Annual Leave</li> <li>• Advanced Sick Leave</li> <li>• Annual Leave</li> <li>• BRAC Restored Leave</li> <li>• Compensatory Time</li> <li>• Credit Hours</li> <li>• Military Leave</li> <li>• Religious Compensatory Time</li> <li>• Restored Annual Leave 1</li> <li>• Restored Annual Leave 2</li> <li>• Restored Annual Leave 3</li> <li>• Sick Leave</li> <li>• Time Off Award</li> <li>• Travel Compensatory Time</li> </ul>

**Note:** An electronic copy of the report will be generated on demand as a concurrent request. The output is tab-delimited, so it can be exported into Excel. Leave types with zero (0) balances are shown in this report

---

## ***Business Process Description (Cont.)***

### **Trigger**

A user needs to verify leave balances in DAI for an employee in order to reconcile and or approve leave entered on a timecard.

### **Prerequisites**

- Users and Supervisors must be loaded
- DCPS leave balances have been transferred via an interface into DAI.

### **Responsibilities**

This report can be run by the following responsibilities:

- OTL CSR – DODEA
- OTL Supervisor Approver – DODEA
- Limited Timekeeper- DODEA
- Super Timekeeper – DODEA

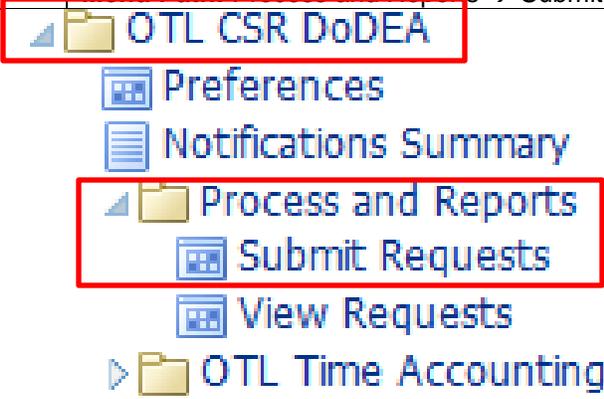
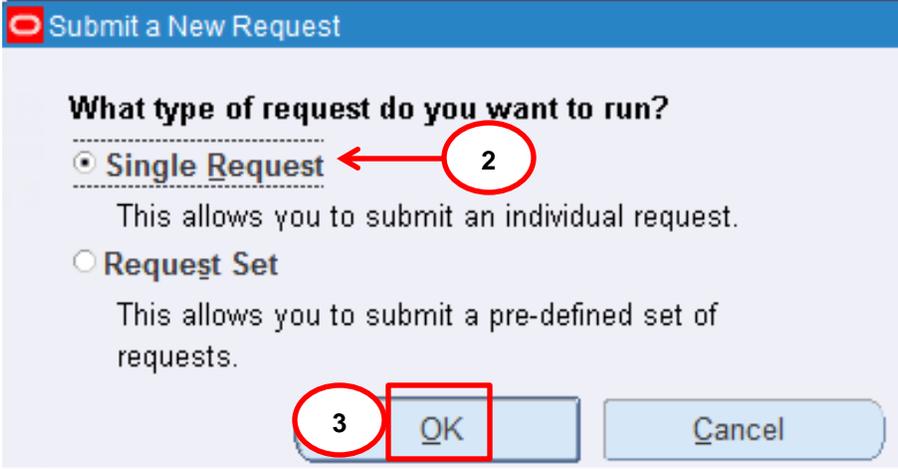
### **Menu Path**

Use the following menu path(s) to begin this task:

- Process and Reports → Submit Request

### **Training Exercise:**

- Create a Leave Availability report.

Review Leave Availability Report	
1.	<p>Start the task using the responsibility and menu path to open the <b>Submit a New Request</b> form:</p> <p><b>Responsibility:</b> OTL CSR – DODEA</p> <p><b>Menu Path:</b> Process and Reports → Submit Requests</p>  <p>The screenshot shows a navigation menu with several items. A red box highlights the 'OTL CSR DoDEA' folder icon. Another red box highlights the 'Process and Reports' folder icon, which is expanded to show a sub-menu. In this sub-menu, the 'Submit Requests' option is highlighted with a red box. Other visible options include 'Preferences', 'Notifications Summary', 'View Requests', and 'OTL Time Accounting'.</p>
	 <p>The screenshot shows a dialog box titled 'Submit a New Request'. It asks 'What type of request do you want to run?' and has two radio button options: 'Single Request' (selected) and 'Request Set'. Below the options are 'OK' and 'Cancel' buttons. Red annotations include a circle with the number '2' pointing to the 'Single Request' radio button, and a circle with the number '3' pointing to the 'OK' button.</p>
2.	Select the <b>Single Request</b> radio button. (Default)
3.	Click the <b>OK</b> button to open the <b>Submit Request</b> form.

**Submit Request**

Run this Request...

Name

Copy...

Reports

Find

Name	Application
XXDAI Automatic Timecard Generation process	XXCustom
XXDAI DCPS SDA Outbound Report	XXCustom
<b>XXDAI Leave Availability Report</b>	XXCustom
XXDAI Timecard Approver Delegation Report	XXCustom
XXDAI Timecard Approver Subordinate Report	XXCustom
XXDAI Timecard Audit Report	XXCustom
XXDAI Timecard Detail Report	XXCustom
XXDAI Timecard Summary Report	XXCustom
XXDAI Timekeeper Report	XXCustom

Find OK Cancel

4

5

6

4.	Enter <b>XXDAI%</b> in the <b>Name</b> field and press the <b>Tab</b> key for a list of standard reports available to this responsibility.
5.	Select the report name “ <b>XXDAI Leave Availability Report</b> ” from the <b>Reports</b> list.  <b>Note:</b> Once the <b>Name</b> field is populated with the report name, the <b>Operating Unit</b> field will automatically enter the agency operating unit name.
6.	Click the <b>OK</b> button to open the <b>Parameters</b> form for this report.

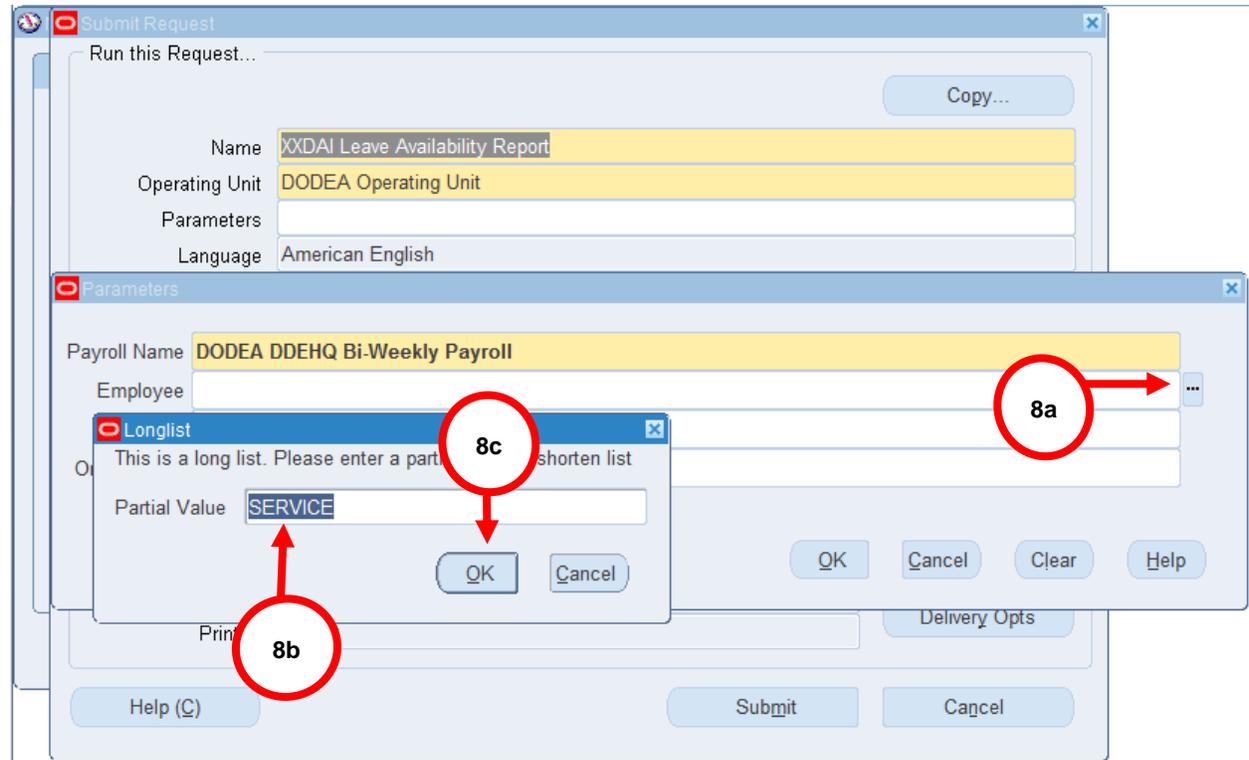
### Submit Request – Parameters

The image shows two overlapping dialog boxes. The top dialog, titled "Submit Request", has a "Run this Request..." section with a "Copy..." button. Below this are four fields: "Name" (containing "XXDAI Leave Availability Report"), "Operating Unit" (containing "DODEA Operating Unit"), "Parameters" (empty), and "Language" (containing "American English"). The bottom dialog, titled "Parameters", has four fields: "Payroll Name" (empty, highlighted in yellow), "Employee" (empty), "Approver" (empty), and "Organization" (empty). At the bottom of the "Parameters" dialog are buttons for "OK", "Cancel", "Clear", and "Help". A red circle with the number "7" and a red arrow points to a small icon (three dots) in the right side of the "Payroll Name" field.

7. Click the **List of Values (LOV)** icon (If the **LOV** icon is not displayed, stretch the parameters box to view it.) This will populate the **Payroll Name** field automatically.

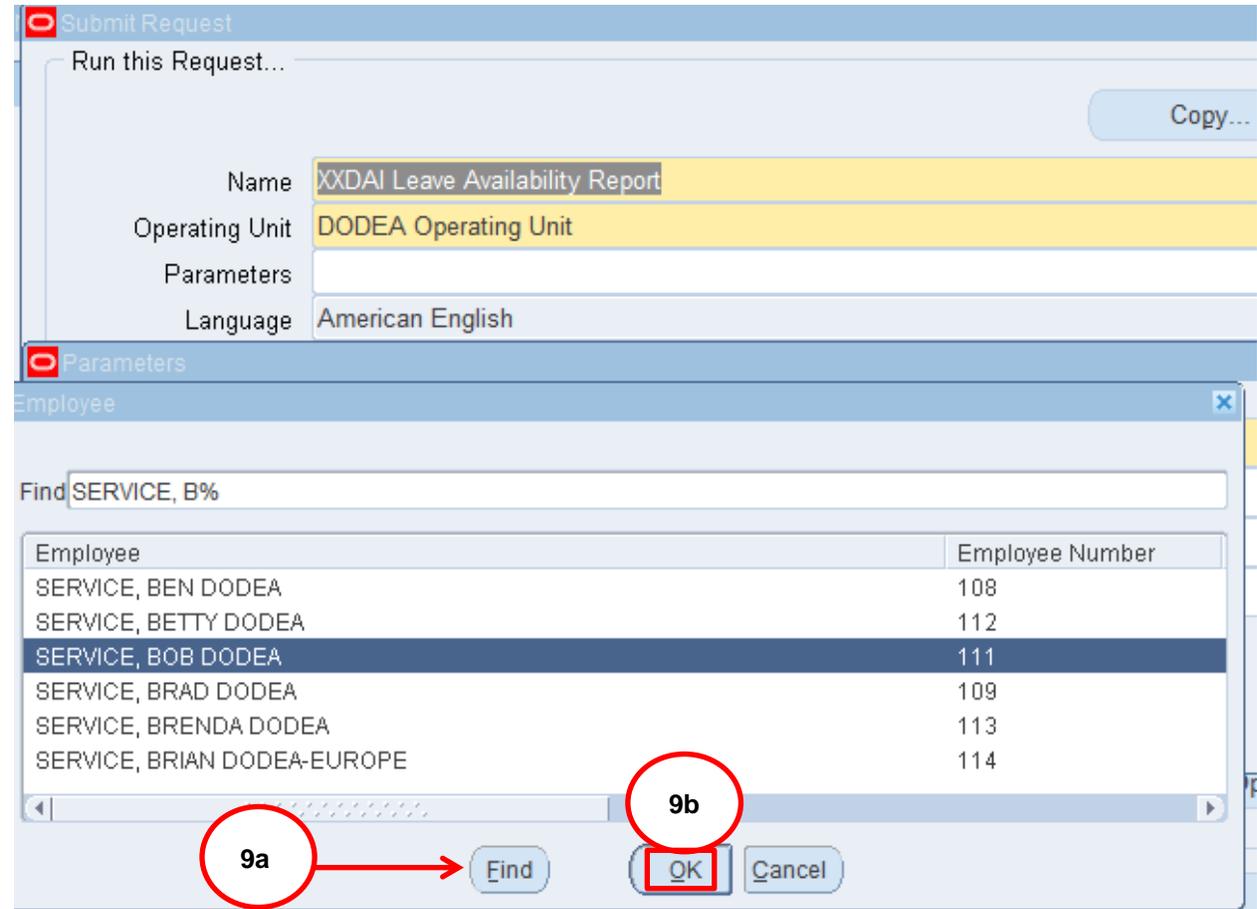
**Note:** Yellow fields are required parameter fields.

### Submit Request – Parameters



8.
  - a) Click the **LOV** icon to open the **Employee** search box.
  - b) Enter the **Last Name** of the person to be searched in the Longlist form.
  - c) Click the **OK** button to activate the search.

**Submit Requests – Parameters**



9.

- a) Select the **person's name** for the report.
- b) Click the **OK** button to complete the employee search.

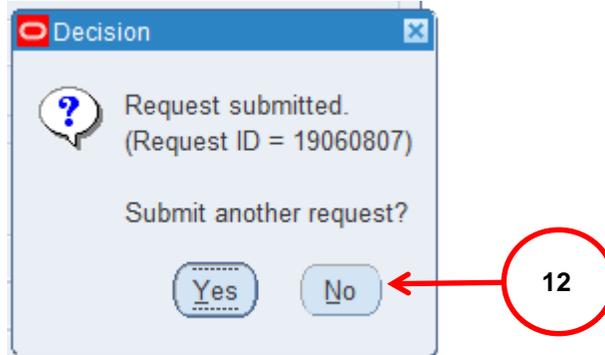
### Submit Requests – Parameters

The screenshot shows two overlapping windows. The top window, titled 'Submit Request', has a 'Run this Request...' section with a 'Copy...' button. Below this are fields for 'Name' (XXDAI Leave Availability Report), 'Operating Unit' (DODEA Operating Unit), 'Parameters', and 'Language' (American English). The bottom window, titled 'Parameters', contains fields for 'Payroll Name' (DODEA DDEHQ Bi-Weekly Payroll), 'Employee' (SERVICE, BOB DODEA), 'Approver', and 'Organization'. At the bottom of the 'Parameters' window are buttons for 'OK', 'Cancel', 'Clear', and 'Help'. A red circle with the number '10' is drawn around the 'OK' button, and a red arrow points from the circle to the button.

- 10.** Click the **OK** button to close the **Parameters** form and complete the **Submit Request** form.
- Note:** This report's design phase has been completed. Additional options would be:
- a)** to run the report by **Approver** instead of Employee to return a list of all employees under a specific approver.
  - b)** to run the report by **Organization** that would return a list of all employees for the selected agency group.

11. Click the **Submit** button to generate the report.

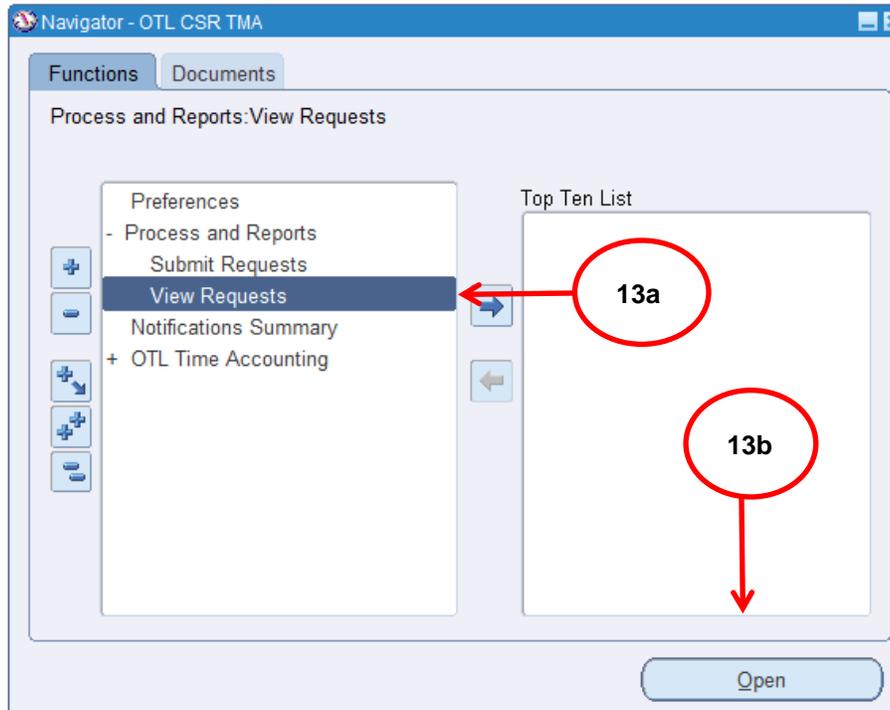
**Decision**



12.

**Decision** – If you would like to submit another request, click the  button. Otherwise, click the  button to submit the request.

### View Requests List



13.

- a) Select the **View Requests** function.
- b) Click the **Open** button to open the **Find Requests** window.

**Note:** Double-clicking the **View Requests** function will open the **Find Requests** window.

### Find Request

**Find Requests**

My Completed Requests

My Requests In Progress

All My Requests

Specific Requests

Request ID

Name

Date Submitted

Date Completed

Status

Phase

Requestor

Include Request Set Stages in Query

Order By **Request ID**

Select the Number of Days to View:

14. Click the **Find** button to display the **Find Requests** form.

**Note:** The **Find Requests** form defaults to **All My Requests**.

**View Leave Availability Report**

The screenshot shows a software interface titled 'Requests'. At the top left is a 'Refresh Data' button, and at the top right is a 'Submit a New Request...' button. Below these is a table with the following columns: Request ID, Name, Parent, Phase, Status, and Parameters. The first row is highlighted with a blue selection bar. Below the table are several action buttons: 'Hld Request', 'View Details...', 'View Output', 'Cancel Request', 'Diagnostics', and 'View Log...'. Two red circles with arrows point to specific buttons: '15a' points to 'Refresh Data' and '15b' points to 'View Output'.

Request ID	Name	Parent	Phase	Status	Parameters
19060807	XXDAI Leave Availability Re		Completed	Normal	OTL CSR DoDEA, 76667, 435
19059657	XXDAI Timecard Approver D		Completed	Normal	2015/02/25 00:00:00, , , 4357
19051653	XXDAI Timecard Approver S		Completed	Normal	2015/02/24 00:00:00, 72684, ,
19051417	XXDAI Timekeeper Report		Completed	Normal	226, 2015/02/24 00:00:00, , ,
19003393	DQM Serial Sync Index Pr		Completed	Normal	
19003366	DQM Serial Sync Index Pr		Completed	Normal	
19003352	DQM Serial Sync Index Pr		Completed	Normal	

15.

- a) Click the **Refresh Data** button if the report does not display as **Complete** in the **Phase** column and **Normal** in the **Status** column.
- b) Click the **View Output** button to view the **Leave Availability** report. The **ID Request** number should match the number show on the **Decision** box in step 12.

**Note:** This process may require the **Refresh Data** button to be clicked multiple times. If the report does not display in a **Complete** and **Normal** status, please contact the **DAI Agency Help Desk** for assistance.

**Leave Availability Report**

Leave Availability as of 25-FEB-15

Organization	Approver	Employee Name	Leave Type	Leave Balance
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	Annual Use or Lose	0
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	Military Leave	0
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	Sick Leave	0
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	Advanced Sick Leave	0
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	Time Off Award	0
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	Travel Compensatory Time	0
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	BRAC Restored Leave	0
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	Annual Leave	0
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	Advanced Annual Leave	0
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	Restored Annual Leave 1	0
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	Restored Annual Leave 2	0
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	Restored Annual Leave 3	0
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	Compensatory Time	0
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	Religious Compensatory Time	0
DODEA TEST ORGANIZATION	SERVICE, BEN DODEA	SERVICE, BOB DODEA	Credit Hours	0

Name of Column	Description
<b>Organization</b>	Organization name assigned by the Agency
<b>Approver</b>	Employee's timecard approver
<b>Employee Name</b>	Employee's full name
<b>Leave Type</b>	Type of leave used by the employee
<b>Leave Balances</b>	Available balance for the following leave types: <ul style="list-style-type: none"> <li>• Advanced Annual Leave</li> <li>• Advanced Sick Leave</li> <li>• Annual Leave</li> <li>• BRAC Restored Leave</li> <li>• Compensatory Time</li> <li>• Credit Hours</li> <li>• Military Leave</li> <li>• Religious Compensatory Time</li> <li>• Restored Annual Leave 1</li> <li>• Restored Annual Leave 2</li> <li>• Restored Annual Leave 3</li> <li>• Sick Leave</li> <li>• Time Off Award</li> <li>• Travel Compensatory Time</li> </ul>

16. Review the **Leave Availability Report**. This report can be exported into Excel.

**Result**

Congratulations! You have successfully generated the Leave Availability Report.